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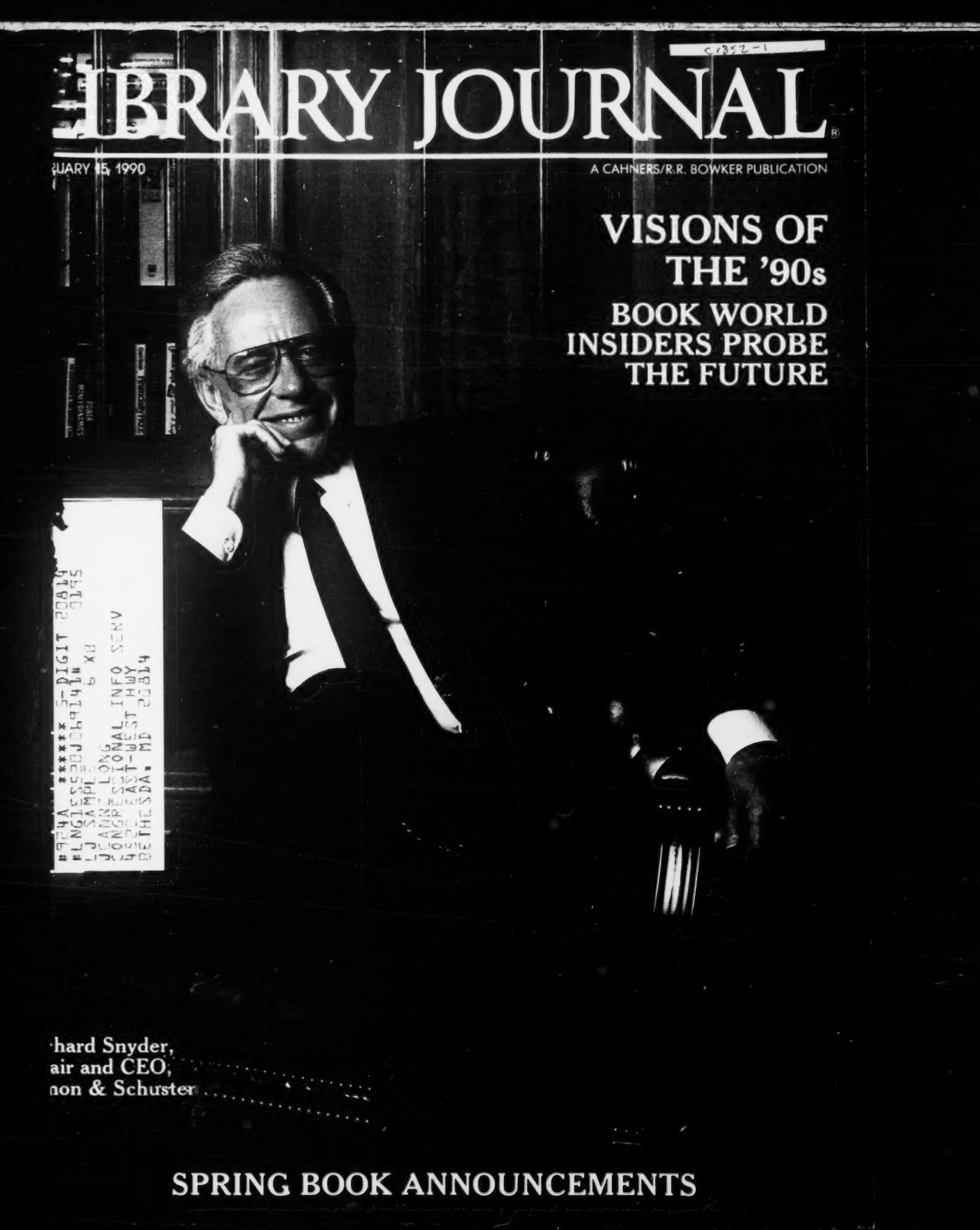

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LIBRARY

Pictured is Simon & Schuster CEO Richard Snyder, one of the key book industry insiders LJ *interviewed for this special "Visions of the '90s" issue, starting on p. 137. Photograph by Jeanne Strongin*

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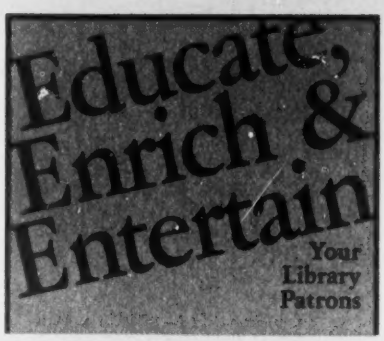

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LIBRARY MARKET OUTLOOK

BY DEBORAH SELSKY

A Close Look at Publishers' Sales

The book industry is inadequately researched, as most of those involved with it will attest. The single light in the murk is the Book Industry Study Group (BISG). Formed in 1987, its membership comprises publishers, wholesalers, retailers, librarians, and others involved with books. Annually since 1977, BISG has published *Book Industry Trends* (*Trends*), which reviews book sales for the previous five years and makes projections for five years into the future. Although publishers often complain that the statistics in *Trends* present a false picture, it is one of the few studies that breaks out the library market.

The data are based on the U.S. Census of Manufacturers for Book Publishing, the official government study of the field compiled every five years, combined with industry sampling figures. For libraries, these include data from the Library Survey Branch of the National Center for Education Statistics, which surveys college and university libraries every two years; the Library Research Center (University of Illinois), which publishes the Index of American Public Library Expenditures; and the Association of Research Libraries' annual survey of its members.

Trends for 1989 was scheduled for publication this past summer. Since it would be the first to be based on the 1987 Census of Book Publishing, the new projections have been awaited both with eagernesss and kepticism. However, the census information has been slow in coming, so it now appears that *Trends* will not be published until late March.

Our interim crystal ball

Newly revised estimates from BISG, using annual sales figures from the Association of American Publishers (AAP), give us a glimpse of the health of the publishing industry.

The new figures indicate that 1988 publishers' sales reached $13.2 billion. Of this total, $12.8 billion were book sales. While this represents an 8.9% sales gain over the year before, more than half of this increase came from higher prices. During 1988, publishers passed along an average 5.5% increase in book prices to buyers (wholesalers, retailers, institutions, etc.).

From 1982 to 1988, publishers' revenues from book sales grew an average 8% per year. At the same time, unit book sales increased by 1.3% or 24 million books per year. Sales of trade books, particularly juvenile books, grew the most (4.6% annually). Unit sales of professional, mass market paperbacks, and college textbooks increased 2.7%, 1.4%, and 1.9%, respectively. Religious, university press, and elhi textbook sales declined.

Publishers' Sales

	1988 (Millions of $)	Annual % 1988	Change 1989
Trade Total	$3036.4	11.9	15.8
Adult Trade	2285.2	10.0	16.5
Juvenile Trade	751.2	18.3	13.9
Religious	675.9	5.9	
Professional	2411.9	9.3	7.5
Book Clubs	690.2	1.7	
Mail Order Pub.	697.7	6.1	
Mass Market PB.	1006.9	10.2	5.8
University Press	198.1	15.9	
Elhi Text	1783.8	5.2	9.0
College Text	1716.8	10.8	16.2
Grand Total	**$13229.1**	**8.5**	**10.5**

Source: Association of American Publishers, Inc. Forecast: Cahners Economics
Note: Categories do not aggregate to grand total. The remaining sales include educational and media materials, standardized tests, subscription reference, and other.

Cahners Economics estimates publishers' sales of books and other materials will reach $14.6 billion in 1989, 10.5% stronger than in 1988. In 1990, Cahners expects publishers' sales to reach $15.5 billion, an increase of 6%. With book prices increasing 6.7% in 1989 and 4.6% in 1990, this will represent real, but moderate, gains.

The slower growth in publishers' sales during 1990 is expected to result from a slowdown in overall economic activity. Cahners predicts consumers' fears about the economy in the first half of the year will prove unfounded and renewed confidence in the economy will result in a boost in consumer spending in the last half of the year.

Trade books are best sellers

Based on monthly sales data from the AAP for the first ten months of 1989, it appears that sales of trade books will perform above average in 1989 and 1990, continuing a trend that has existed since at least 1982. In 1989, trade sales will reach $3.52 billion, 15.8% higher than in 1988. In 1990, sales of trade books will reach $3.76 billion, 6.9% higher than our estimate for 1989. By 1990, trade books will be 24.3% of total publishers' sales, up from 18% in 1982.

Sales of children's books have outpaced those of adult books since 1982. Trade books for children have grown at an average compound rate of 17.1% since 1982, compared to the 11.7% rate for adult trade. Still, juvenile books remain the smaller share of total trade sales (24.3% in 1989).

In 1989, children's paperbound books were the fastest-growing component of trade books. Publishers' sales grew an estimated 21.3% to reach $233.8 million. Juvenile hardbound books reached an estimated $622.1 million in 1989, 11.4% higher than a year earlier. Juvenile trade books are expected to grow 8.8% to $930.9 million in 1990.

Adult trade books have grown at a slightly slower pace over the 1982–1989 period but remain the more important segment for publishers. Sales of adult hardbound books reached $1.66 billion in 1989, an increase of 16% over 1988. Sales of adult paperbacks grew 17.2% in 1989 to $999.2 million. In 1990, adult trade books will grow 6.4% to $2.83 billion.

Librarians can expect publishers to follow the market. The recent boom in childrens publishing will continue, with new imprints and series, particularly in paperback, proliferating.

Deborah Selsky is an economist with Cahners Economics, which provides industry analyses and forecasting services for the markets its magazines serve